



RICE MARKET REPORT

"An In-Depth Analysis of Pakistan & Global Rice Markets and Trends"

Monthly report **"November 2025 Edition"**

Dated: 25th November 2025

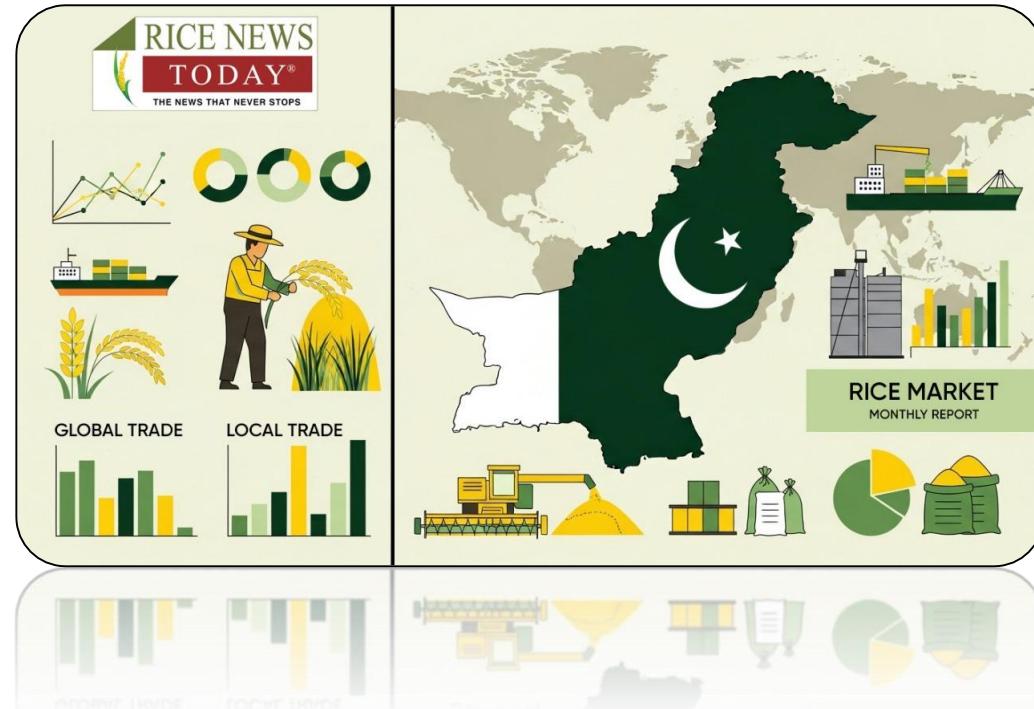


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Mapping Traditional and Emerging Import Markets for Pakistani Basmati Rice



TRADITIONAL BASMATI IMPORT MARKETS		
Region	Country	Key Highlights
Europe & UK	UK, Italy, Belgium, Netherlands, Germany	~67% share in brown Basmati segment; zero-duty access under GSP+; strong price premium market.
GULF & Middle East	UAE	One of the largest buyers; consistent demand for both traditional and premium Basmati
	Saudi Arabia	Traditional buyer; increasing demand for aged and aromatic varieties
	Iran	Resumed barter trade in FY2024–25 ; vital buyer despite logistical challenges
	Oman, Qatar	Smaller but steady volumes; part of GCC distribution hub
Africa	Kenya	Key African market; mix of basmati and non-basmati shipments
North America	USA, Canada	Premium-focused market; growing demand for organic & low-residue rice

EMERGING BASMATI IMPORT MARKETS		
Region	Country	Key Highlights
Southeast Asia	Malaysia	Increased interest after India's export disruption; retail & industrial buyers active
	Indonesia	Rising demand for parboiled & aromatic Basmati; steady growth
	Philippines	New entry point with public-sector G2G imports
South Asia	Bangladesh	First-ever G2G rice deal signed in 2025; includes premium varieties
East Asia	China	Importing broken rice & trying Basmati blends; demand rising for aromatic, cost-efficient varieties
Africa	Somalia, Benin, Ghana	Expanding trade networks; growing basmati interest among traders
Central Asia	Uzbekistan, Kazakhstan	Untapped retail potential; test shipments reported by REAP
Middle East	Iraq, Syria	Post-conflict markets seeing gradual rice import growth

Top 10 Import Markets of Pakistani Basmati Brown Rice

Rank	Country	Estimated Share	Key Notes
1	United Kingdom	~24%	Largest market; high demand for low-residue, organic-compliant rice
2	Italy	~21%	Major retail and ethnic food sector buyer
3	Netherlands	~13%	Hub for EU distribution; increasing organic imports
4	Belgium	~12%	Active in brown rice reprocessing and EU redistribution
5	Spain	~11%	Retail-focused imports for value chains and supermarkets
6	Portugal	~5%	Growing demand in Portuguese ethnic retail sector
7	United States	~4%	Niche demand for organic and ethnic store chains
8	Denmark	~2.5%	Imports for both ethnic and sustainable food segments
9	Poland	~2%	Mid-sized volume; retail and food processing sector
10	France	~2%	Small but steady importer of low-pesticide brown rice

Estimated based on REAP, Volza, and COMTRADE shipping data. Country-level FY2024–25 stats to be confirmed post PBS/TDAP release.

- These countries collectively account for **most** of Pakistan's **Basmati brown rice exports**.
- **EU** and **UK** remain critical due to zero-duty access and preference for brown rice in retail and processing chains.
- Early **FY2024–25** data (**Sept–Aug**) confirms **150,065 MT** of brown rice exports to **13 countries**, with these **10** leading the volume share.

Top 10 Basmati Rice Markets for Pakistan & India

RANK	KEY MARKET	PAKISTAN'S PERSPECTIVE 	INDIA'S PERSPECTIVE 
1	United Arab Emirates (UAE)	A leading buyer of Pakistani basmati and also a major re-export hub , redistributing rice to other Gulf and African markets.	Strong destination for India as well, but more important as a re-export gateway than a final consumer.
2	Saudi Arabia	One of Pakistan's biggest Traditional market an important destination for Pakistan, though volumes fluctuate.	India's single largest market , buying the highest share of its basmati exports.
3	United Kingdom	One of Pakistan's biggest premium markets in Europe, where Pakistani basmati enjoys strong brand loyalty.	Also significant for India, with steady demand from South Asian diaspora.
4	Italy & Spain (EU)	Among the largest EU importers of Pakistani basmati, both countries maintain long-standing trade links.	India also exports to these markets, but Pakistan has a stronger share.
5	Netherlands, Belgium, France, Germany (EU cluster)	Collectively a core region for Pakistani exports , with consistent demand across Western Europe.	India is present but holds a smaller share compared to Pakistan.
6	Iran	Imports from Pakistan are inconsistent due to trade restrictions.	One of India's biggest and most reliable buyers.
7	Iraq	Limited direct trade for Pakistan.	A key growth market for India in recent years.
8	Yemen & Oman	Significant for Pakistan, especially Oman, where Pakistani rice has deep market penetration.	Moderate for India, with demand driven mostly by price competitiveness.
9	Kuwait & Qatar	Both countries regularly import Pakistani basmati, ranking within the top 10 destinations.	Also purchase Indian basmati, though in slightly higher volumes.
10	United States	Smaller but growing market for Pakistan, supported by diaspora demand.	A major premium market for India, steadily expanding.

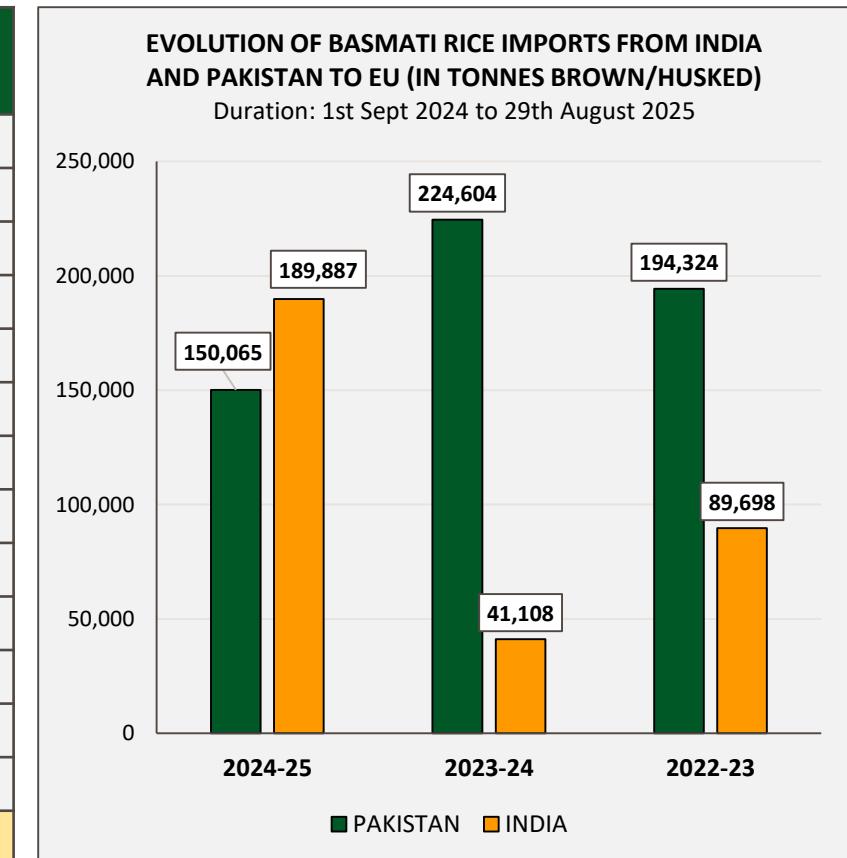
Comparative Analysis of EU Basmati Rice Imports from India and Pakistan



EVOLUTION OF BASMATI RICE IMPORTS FROM INDIA AND PAKISTAN TO EU (IN TONNES BROWN/HUSKED)

Duration: 1st Sept 2024 to 29th August 2025

MS	Pakistan (2024-25)	India (2024-25)	Total (2024-25)	Pakistan (2023-24)	India (2023-24)	Total (2023-24)	Pakistan (2022-23)	India (2022-23)	Total (2022-23)
Belgium	18,081	44,070	62,151	31,145	2,098	33,244	40,450	5,500	45,950
Czechia	25	—	25	—	—	—	25	—	25
Denmark	3,624	210	3,834	3,612	7	3,619	2,203	—	2,203
France	18,932	11,443	30,375	21,731	2,559	24,290	23,847	8,384	32,231
Germany	1,524	4,802	6,326	2,827	1,879	4,706	1,970	2,892	4,862
Greece	—	325	325	—	—	—	—	—	—
Italy	44,953	33,927	78,880	50,124	8,270	58,394	46,561	16,621	63,181
Netherlands	26,099	44,400	70,499	54,898	18,589	73,486	17,573	42,932	60,505
Poland	7,304	6,609	13,913	12,250	1,260	13,510	8,450	1,875	10,325
Portugal	6,113	20,306	26,419	13,544	4,696	18,240	8,943	6,622	15,565
Romania	3,375	—	3,375	2,000	—	2,000	100	—	100
Spain	23,409	20,421	43,830	32,459	1,675	34,134	44,202	4,767	48,969
Sweden	—	—	—	—	75	75	—	105	105
Grand Total	150,065	189,887	339,952	224,604	41,108	265,713	194,324	89,698	284,022



Source: European Commission

EU Basmati Rice Import Trends: PAKISTAN & INDIA (2024–25 vs 2025–26)



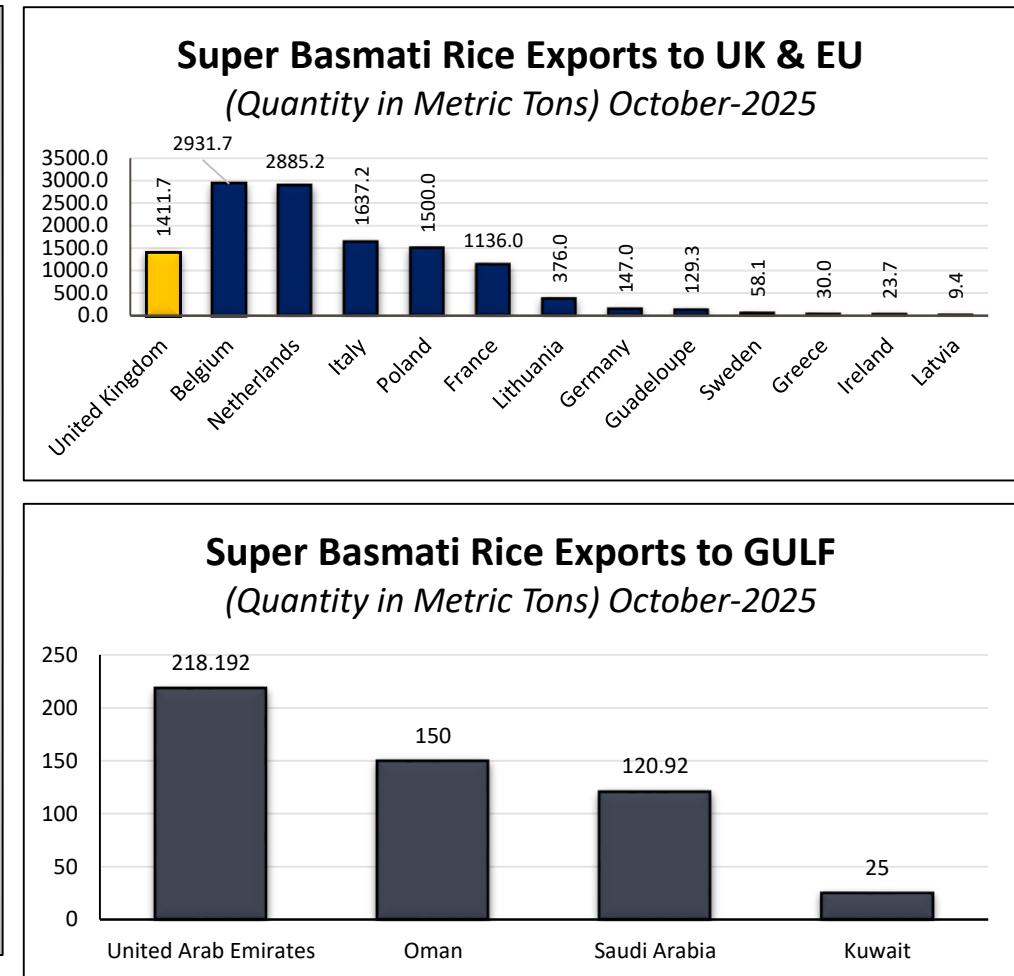
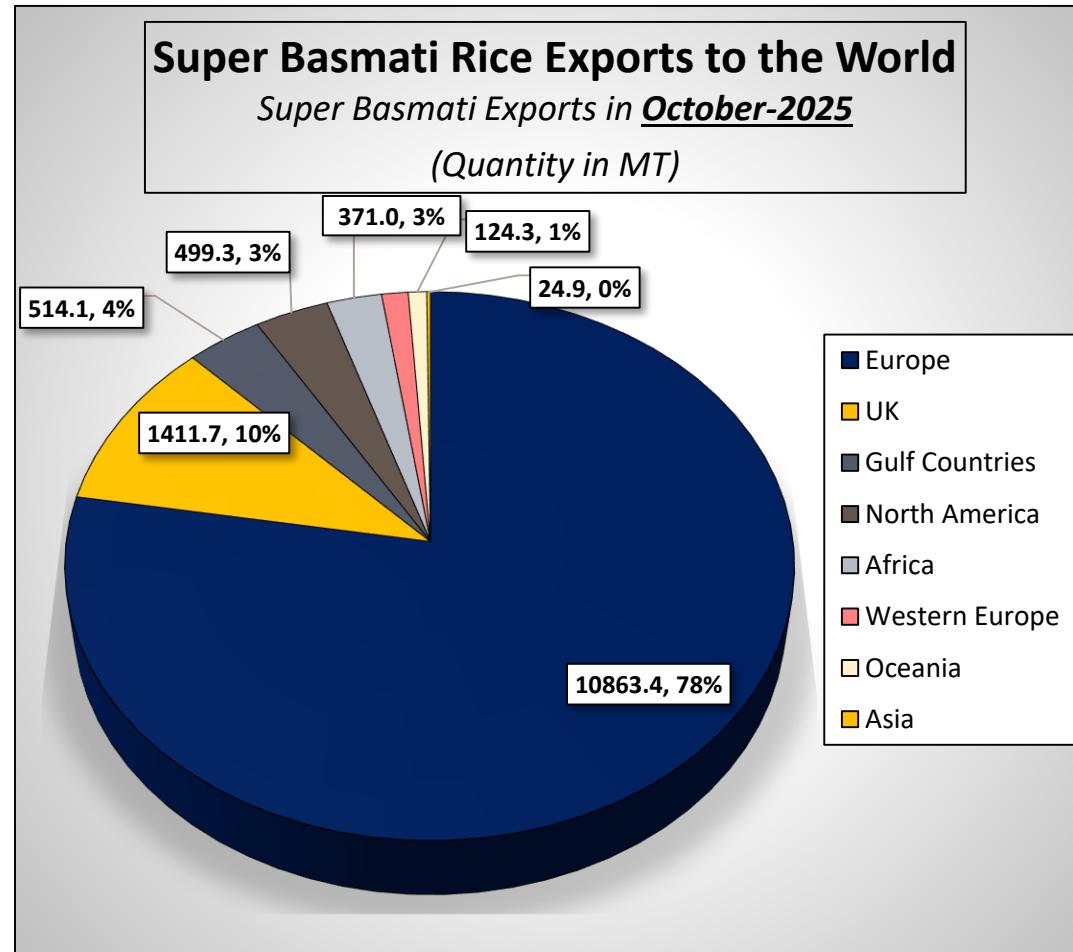
(2025-2026) EVOLUTION OF BASMATI RICE IMPORTS FROM INDIA AND PAKISTAN TO EU (IN TONNES BROWNHUSKED)

Duration: 1st SEP-2025 to 31th AUG-2026 (Last updated on 18th November 2025).

COUNTRIES	PAKISTAN (2025-26)	INDIA (2025-26)	TOTAL (2025-26)	PAKISTAN (2024-25)	INDIA (2024-25)	TOTAL (2024-25)
Belgium	2,300	2,675	4,975	12,133	300	12,433
Bulgaria			-			-
Czechia			-			-
Denmark	1,210	231	1,441	731		731
France	7,225	6,457	13,682	10,932	210	11,142
Germany	675	1,273	1,948	1,274	855	2,129
Greece			-			-
Italy	4,630	14,725	19,355	13,214	1,616	14,830
Netherlands	4,713	12,999	17,712	13,887	5,137	19,024
Poland	500	805	1,305	1,594	599	2,193
Portugal	250	2,675	2,925	2,248	500	2,748
Romania		726	726			-
Spain	3,700	2,892	6,592	6,711	697	7,408
Sweden			-			-
Grand Total	25,203	45,458	70,661	62,724	9,914	72,638

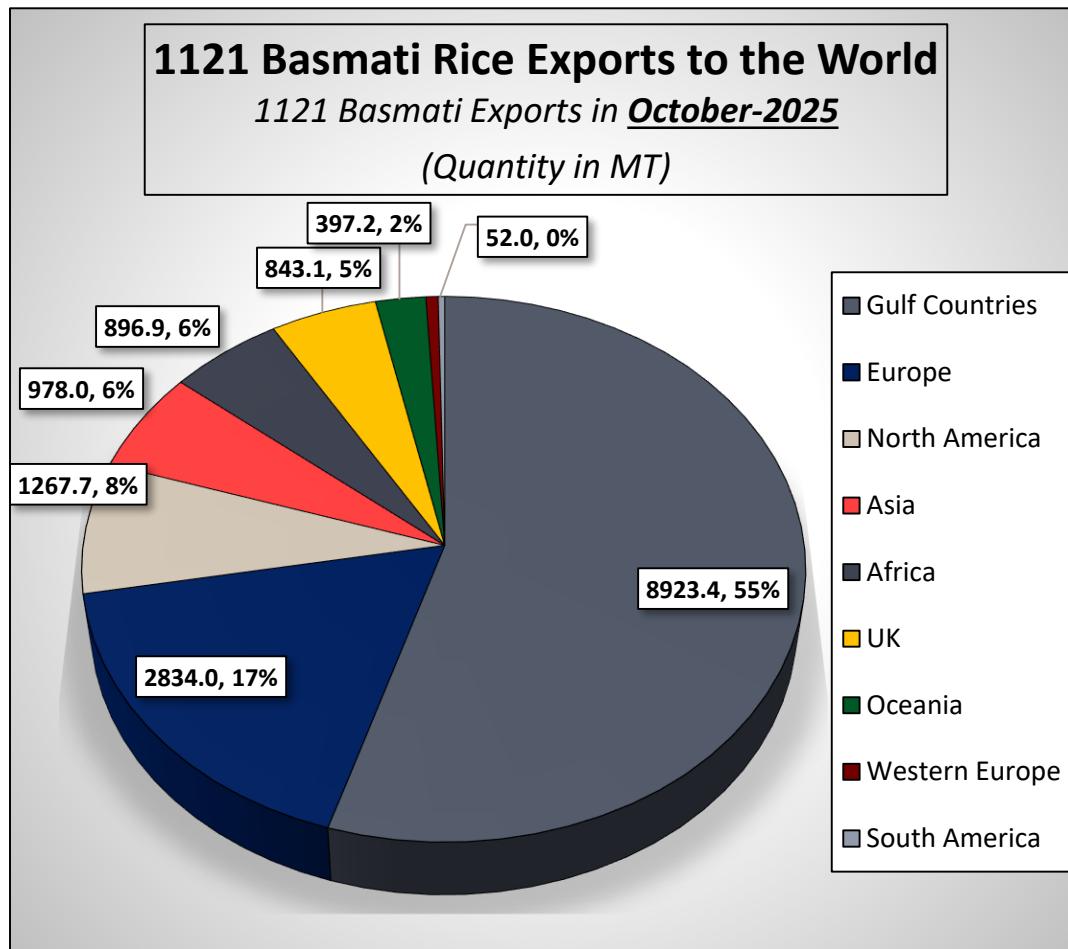
Source: European Commission

SUPER BASMATI EXPORTS TO THE WORLD & MAJOR DESTINATIONS

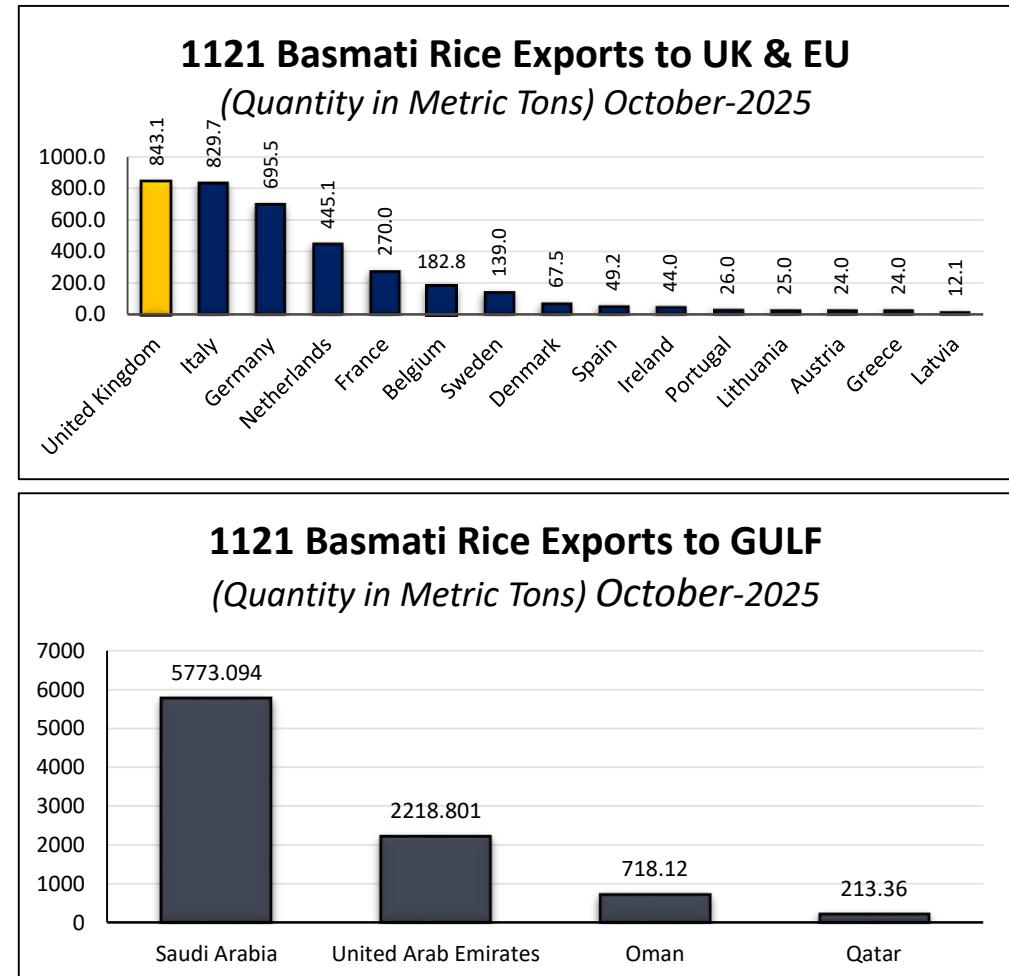


"Please note: Export data is compiled from Pakistani port records and may include minor discrepancies."

1121 BASMATI EXPORTS TO WORLD & MAJOR DESTINATIONS



"Please note: Export data is compiled from Pakistani port records and may include minor discrepancies."



Mapping Traditional and Emerging Import Markets for Pakistani Non-Basmati Rice



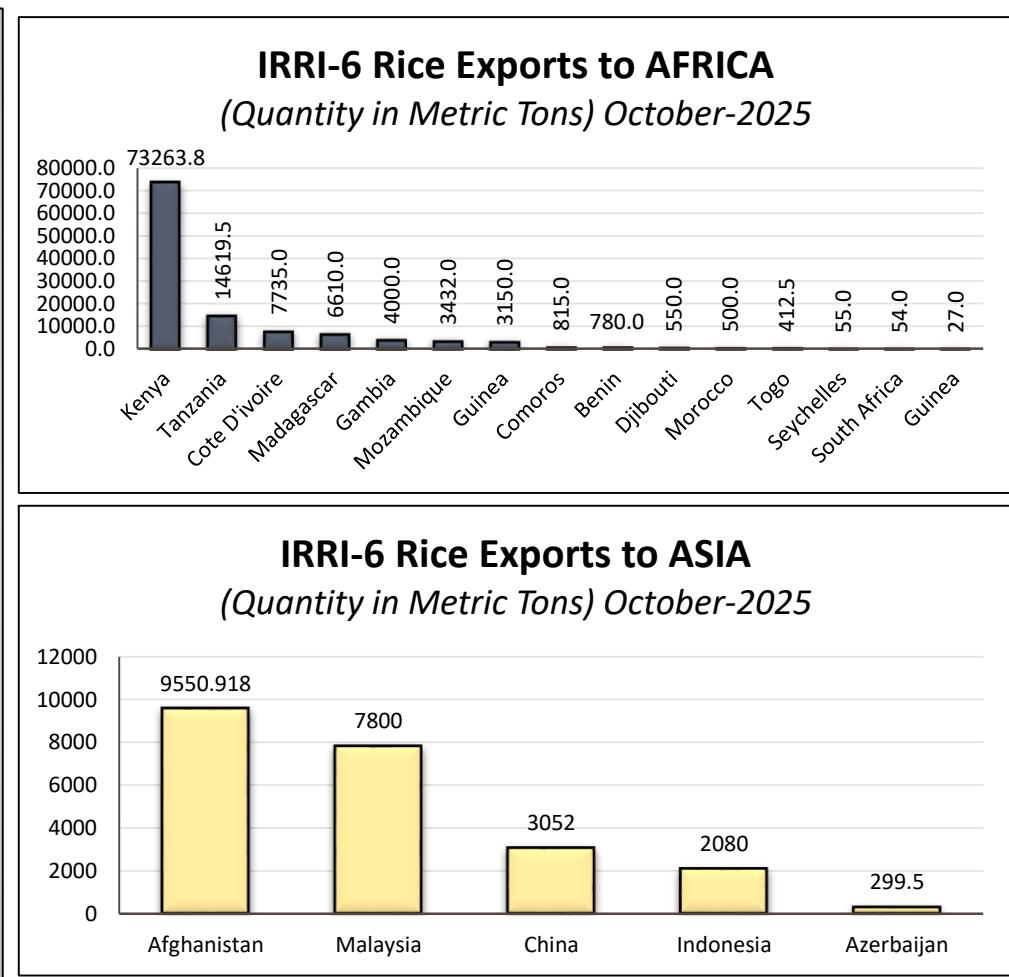
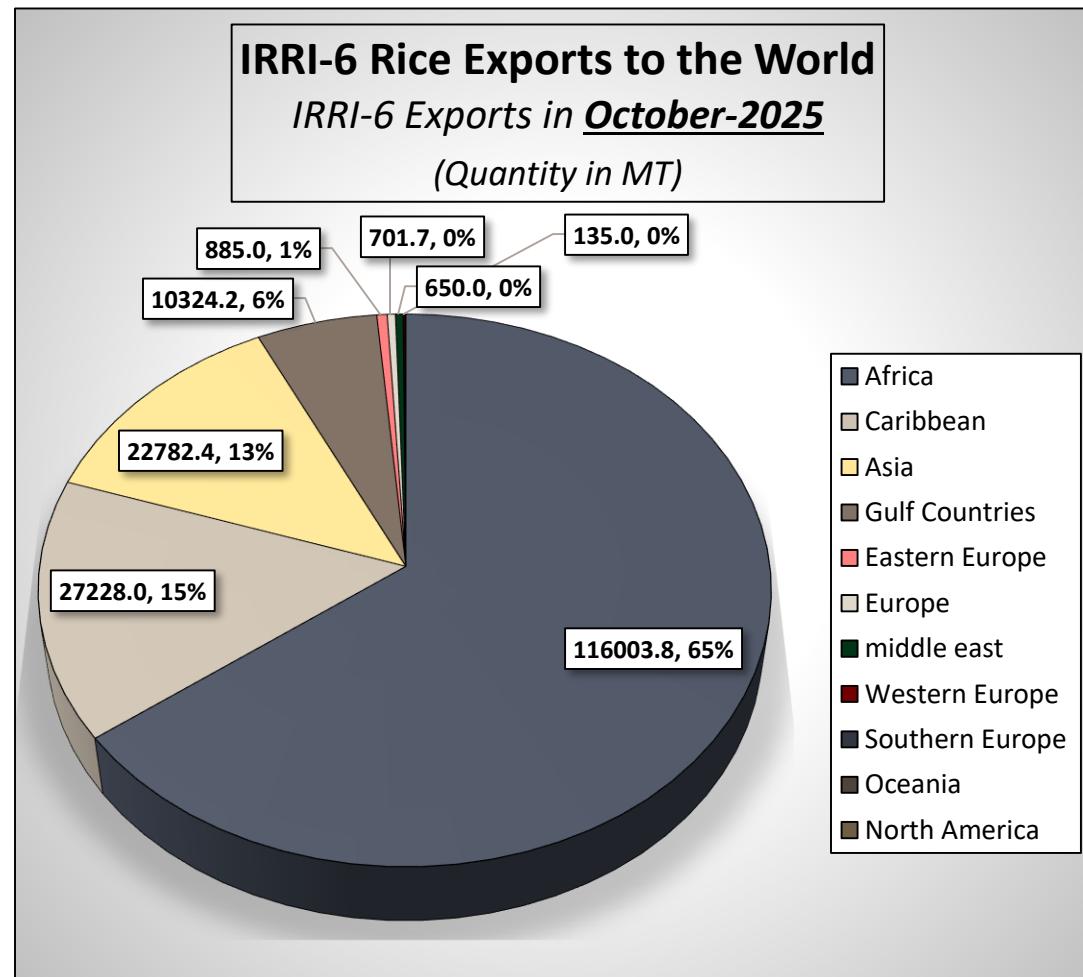
TRADITIONAL NON- BASMATI IMPORT MARKETS

Region	Country	Key Highlights
Africa	Kenya	Largest buyer; ~252,000 MT in 2024. Customs value cut \$615 → \$460/MT ; duty-free quota of 500,000 MT till Dec 2025 ensures strong FY2025 demand.
	Mozambique, Madagascar, Tanzania, Djibouti, Cote d Ivoire	Long-time importers; steady demand for parboiled and broken rice, driven by government procurement.
GULF & Middle East	Iran	Imports IRRI and parboiled rice; trade continues through barter/private channels despite sanctions.
	UAE, Saudi Arabia	Steady buyers of IRRI and parboiled rice; UAE also re-exports Pakistani rice to GCC & North Africa.
South Asia	Afghanistan	Dependable market via border trade; imports mainly IRRI-6 and Sella rice
Southeast Asia	Malaysia	Has imported both IRRI and parboiled rice from Pakistan for public tenders

EMERGING NON-BASMATI IMPORT MARKETS

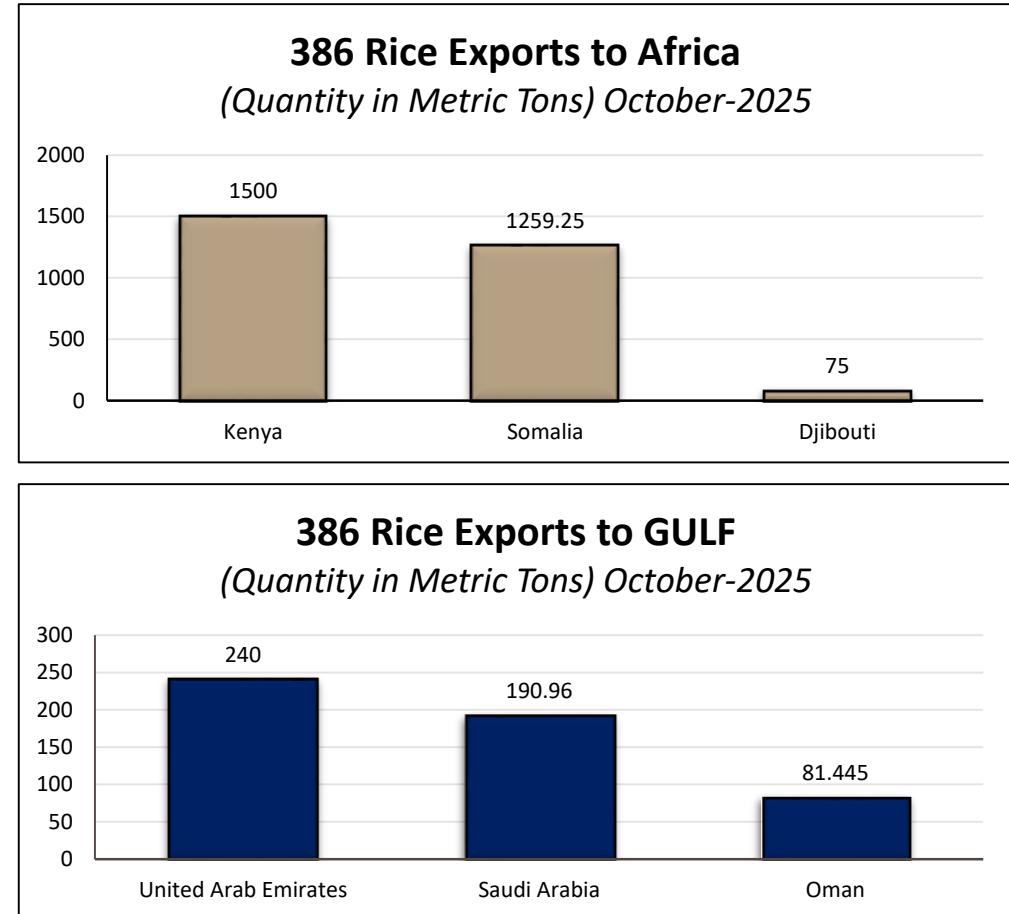
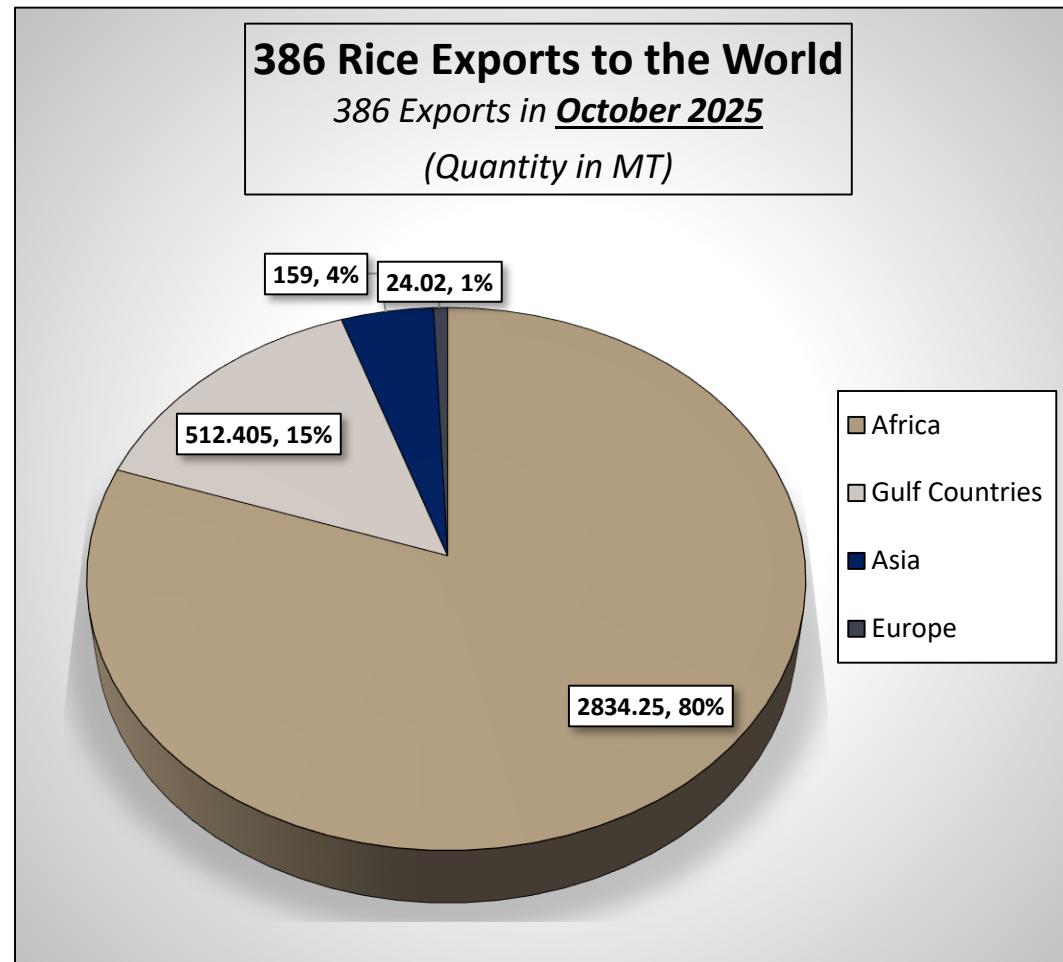
Region	Country	Key Highlights
South Asia	Bangladesh	First-ever G2G rice deal signed in 2025 ; imports include parboiled and white rice
Southeast Asia	Indonesia	Govt. tenders led to ~61,000 MT import in 2024 ; continued interest in 2025
	Philippines	Philippines' import liberalization has opened new demand for Pakistani broken/parboiled rice.
Africa	Benin, Ghana, Nigeria	Strong demand for IRRI-6 and white rice via bulk shipments
Asia	China	5% broken rice and IRRI-6 for feed and processing; price-efficient preference
Central Asia	Uzbekistan, Tajikistan	Trial shipments underway; retail and wholesale demand rising
Latin America	Mexico, Cuba (exploratory)	Initial interest building through bilateral talks

IRRI-6 Rice EXPORTS TO WORLD & MAJOR DESTINATIONS



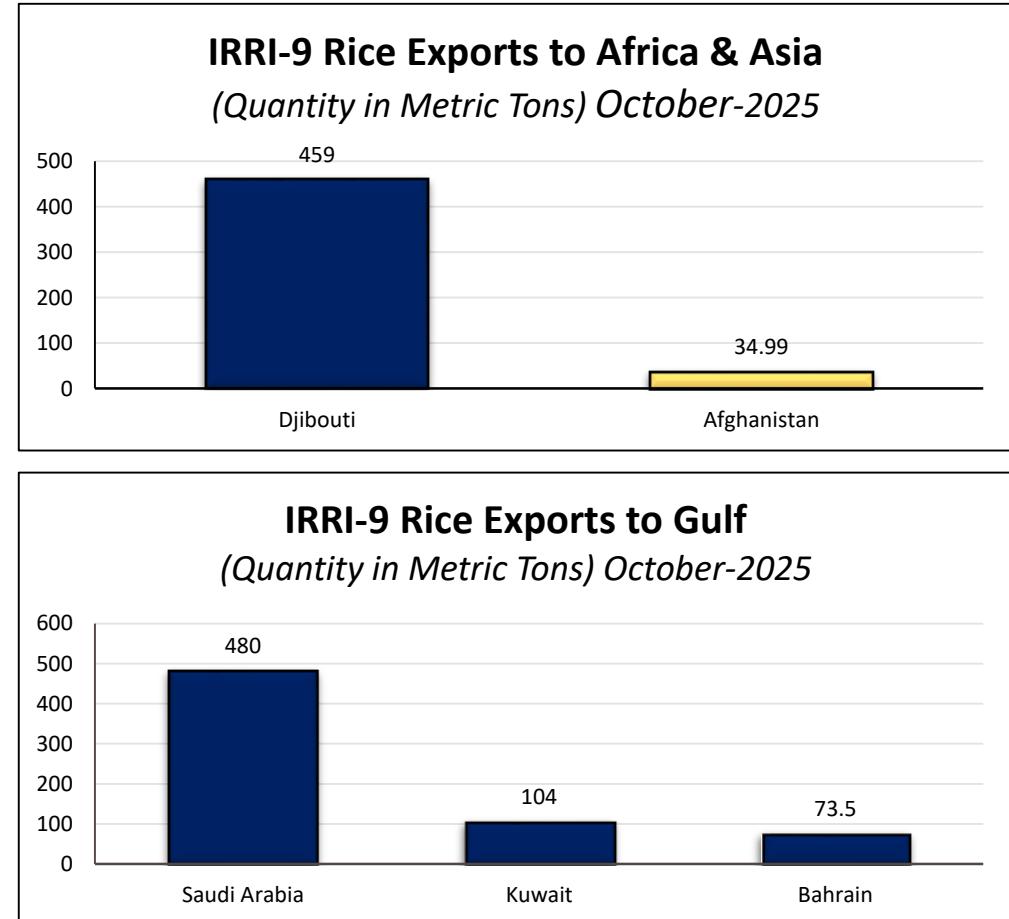
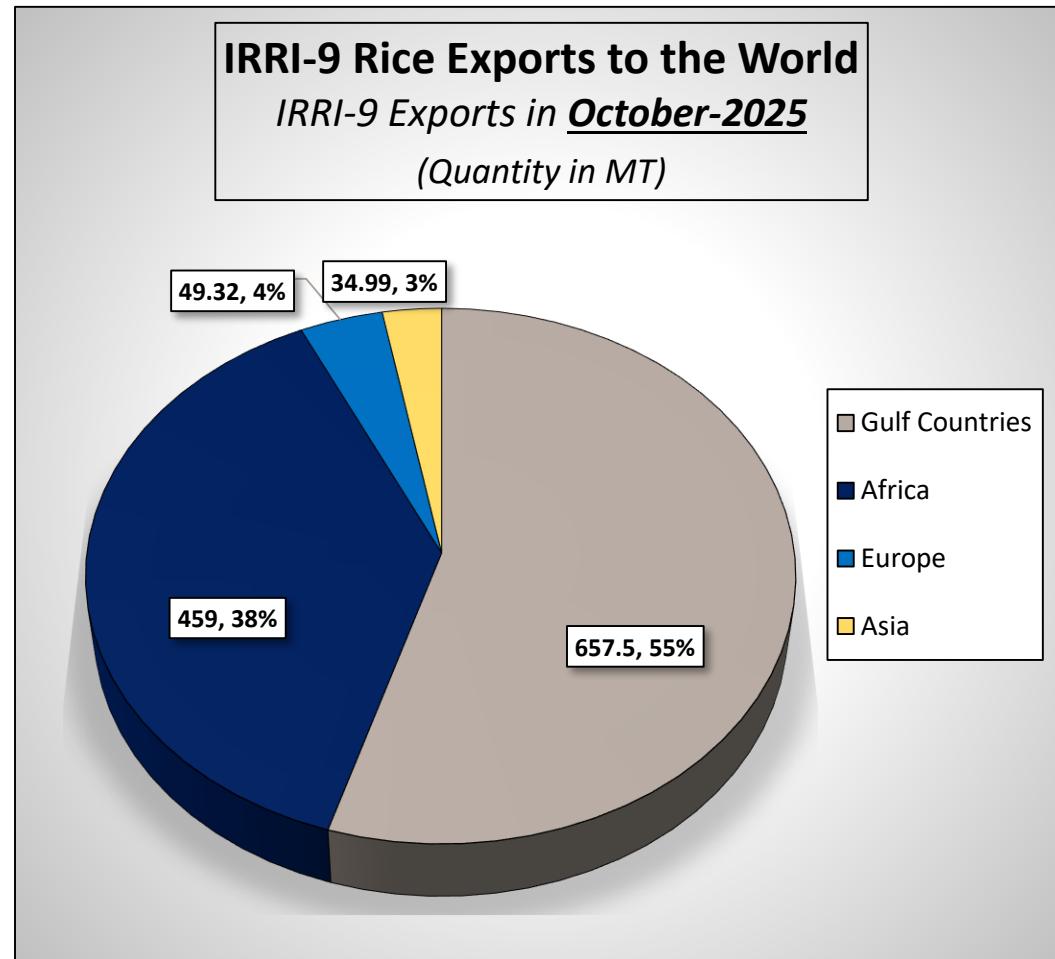
"Please note: Export data is compiled from Pakistani port records and may include minor discrepancies."

386 Rice EXPORTS TO WORLD & MAJOR DESTINATIONS



"Please note: Export data is compiled from Pakistani port records and may include minor discrepancies."

IRRI-9 Rice EXPORTS TO WORLD & MAJOR DESTINATIONS



"Please note: Export data is compiled from Pakistani port records and may include minor discrepancies."

APPROVED BASMATI & NON- BASMATI VARIETIES OF PAKISTAN

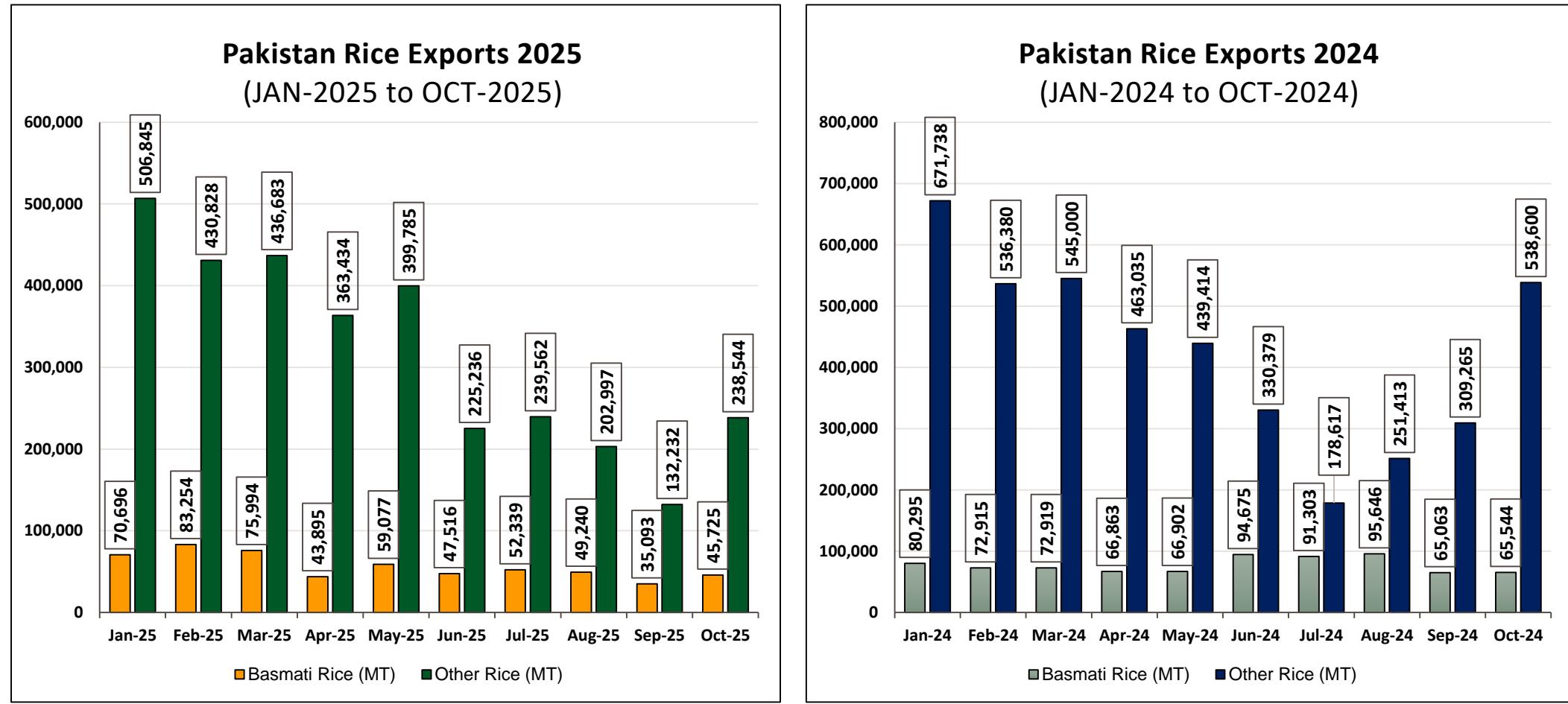


APPROVED BASMATI VARIETIES		APPROVED NON-BASMATI VARIETIES	
Basmati -370	Kissan Basmati	IRRI-6	IRRI-9
Basmati C 622	NIAB Basmati 2016	JKS- 282	NIBGE GSR 8
Sultan Super Basmati	Noor Basmati	JKS- 133	SKCB – 370-5-32
Basmati 198	Super Gold	NIAB IRRI-9	
Basmati 385	Super Basmati 2019	NIAB 2013	
Super Basmati	NIBGE Basmati 2020	JKS- 434	
Basmati 2000	PK 2021 aromatic	NIBGE -5	
Shaheen Basmati	JKS 111 H	NIAB ST-9	
Basmati 515	Sona Super Basmati	NIAB IRRI – 195	
PK IRRI-6 aromatic	Vital Super Basmati	JKS- 706	
Punjab Basmati	NIAB HT 39	NIBGE GSR 6	
NIAB HT 18	NIAB S-39	NIBGE GSR 7	
GUARD 101	NIAB Super		
Chenab Basmati	NIAB Basmati-2016		

Source: [Approved Basmati Rice Varieties](#)
[Approved Non-Basmati Rice Varieties](#)

PAKISTAN RICE EXPORTS COMPARISON:

(2024 & 2025)



Source: Pakistan Bureau of statistics

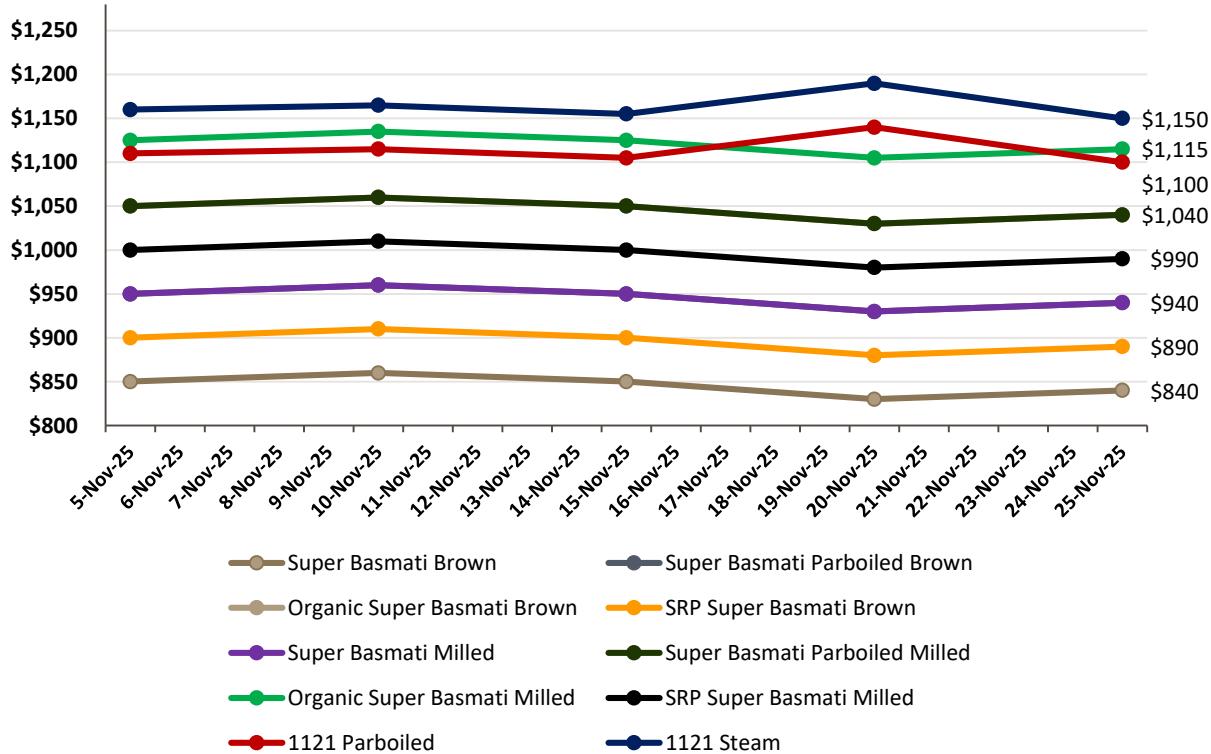
PAKISTAN RICE PRICES COMPARISON:

EXPORT PRICES F.O.B BASIS (PER TON).



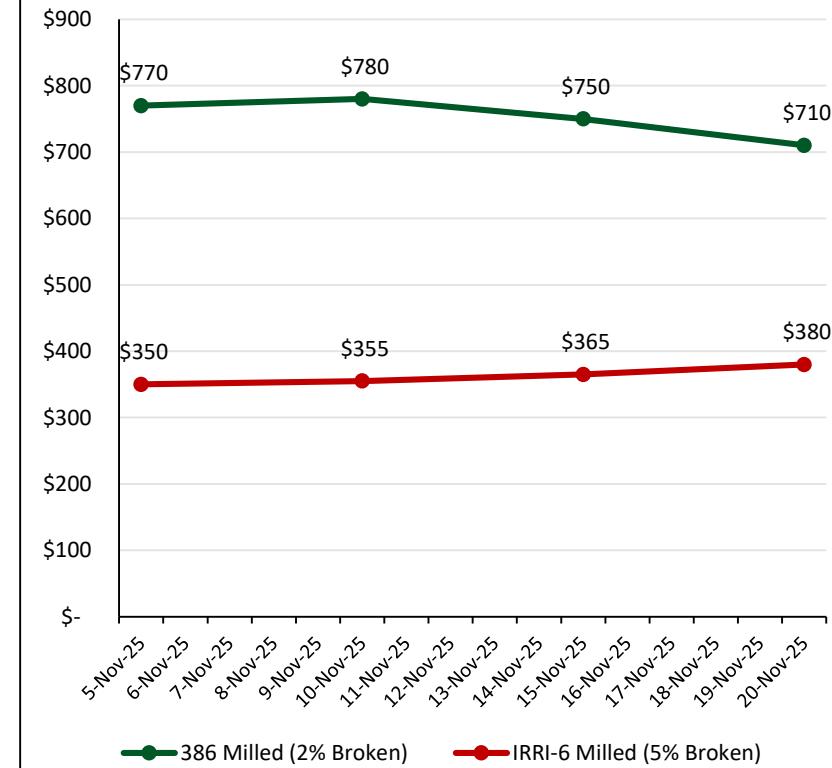
Pakistan Basmati Rice Export prices (2025-26)

F.O.B Basis (per ton) 2% Broken (50kg pp bag)



Pakistan Non- Basmati Rice Export prices (2025-26)

F.O.B Basis (per ton) (50kg pp bag)



Note: (in 1st graph) Although 10 varieties are listed, only 8 price lines appear on the chart because: (Super Basmati Parboiled Brown and Super Basmati Milled share the same FOB prices) & (Organic Super Basmati Brown and Super Basmati Parboiled Milled also share the same FOB prices), **Updated on 25-November 2025.**

Last Updated: 4August 2025, For more details on Pakistan market rice prices Please click here: [Pakistan Rice Market](#)

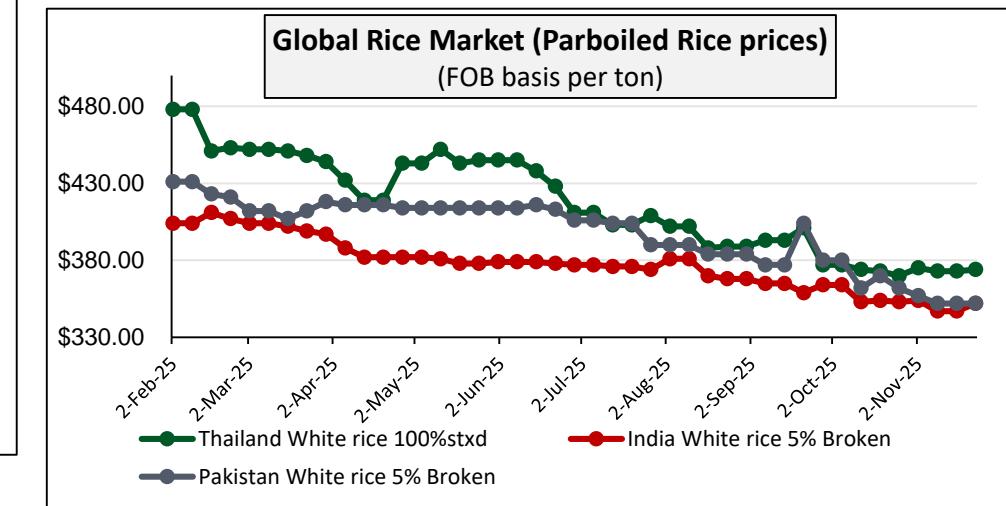
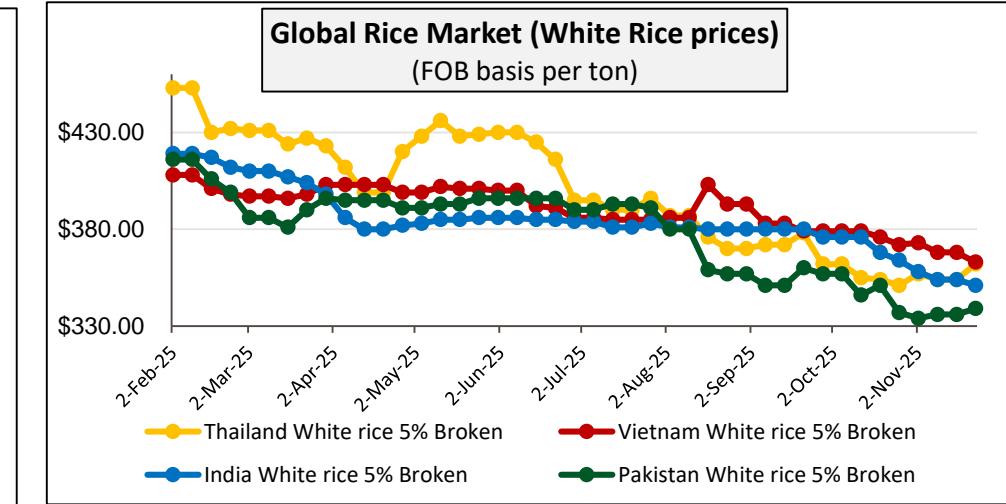
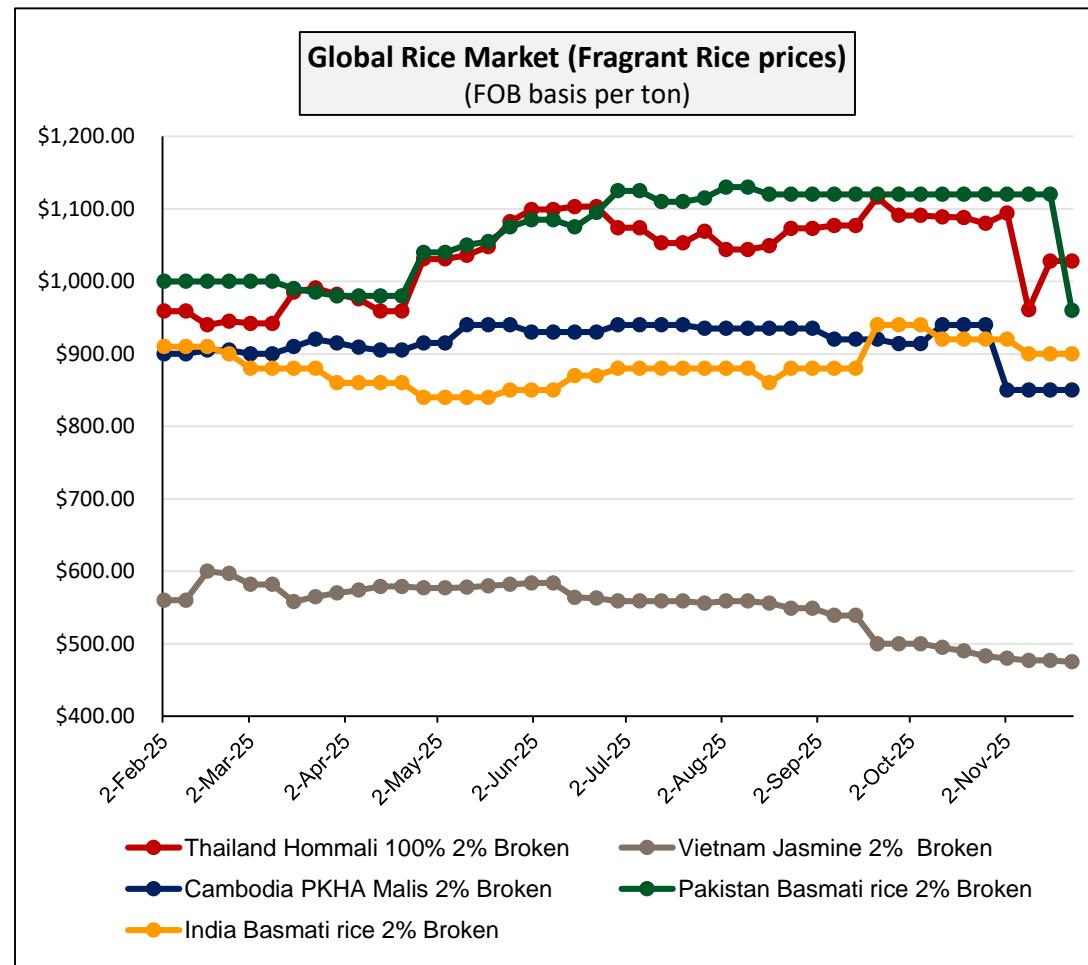
PAKISTAN RICE SECTOR – Key highlights of (November 2025)

- Pakistan exported 998,063 MT of rice worth \$581.169m in July–October 2025, down 46.40% from 1.595m MT (\$1.084b) last year. **Basmati exports** were 182,807 MT (\$202.355m) versus \$331.817m, while **non-Basmati** reached 815,256 MT (\$378.815m) versus 1.277m MT (\$752.375m). Overall food exports fell 34.93% to \$1.538b, with YoY October food exports down 42.51%, but MoM up 28.59%. (25th November 2025)
- The **Trading Corporation of Pakistan (TCP)** issued a tender to purchase 100,000 tonnes of IRRI-6 rice for export to **Bangladesh**, with bids due by November 28. Shipments must be ready within 45 days. The move follows improved **Pakistan-Bangladesh trade ties since 2024**. Pakistan's rice exports fell 28% in Q1 FY26, partly due to India resuming exports and removal of **basmati MEP**, while the US market offers growth opportunities. (25th November 2025)
- Pakistan reaffirmed its commitment to the EU's **GSP+ trade** scheme while urging the Netherlands to address market-access issues, including the **basmati rice GI dispute** with India and withdrawn ethanol concessions. Officials highlighted that India's exclusive claim on Basmati lacks historical basis and stressed untapped potential for rice exports to the **Netherlands**. Talks also covered broader trade, agriculture, and technology cooperation. (23rd November 2025)
- Pakistan won a major **basmati trademark case** as the **New Zealand High Court rejected India's appeal** seeking exclusive certification rights. The court upheld that basmati is grown in both **Pakistan and India**, protecting **Pakistani exporters' market access**. The ruling reinforces Pakistan's position as a legitimate producer and strengthens ongoing international efforts by its **Geographical Indications (GI) Cell** against similar claims. (16th November 2025)
- The Sindh government urged the federal government to develop a **mechanism for fixing rice (paddy) support prices**. Sindh plans to provide all agricultural subsidies through Benazir Hari Card and has set up district-level committees to address farmers' complaints, curb middlemen exploitation, and ensure fair compensation. Officials emphasized the need for a long-term, sustainable federal strategy for agriculture with provincial collaboration. (14th November 2025)
- The Agricultural Research Institute **Dera Ismail Khan** successfully tested a **Chinese crawler-type combine harvester**, which performed cutting, threshing, and cleaning in one cycle. Its adaptability to soft and waterlogged fields is seen as a step toward reduced labor, lower losses, and future mechanization across rice-growing regions (4th November 2025).

Source: News, Publications & Reports

GLOBAL RICE PRICES COMPARISON:

EXPORT PRICES F.O.B BASIS (PER TON)



For more details on global rice prices Please click here: [Global Rice Market](#)

(All prices updated on 23, Nov 2025) Source: TREA (Thai Rice Exporters Association)

Hot Issue This Month – Pakistan Wins Major Basmati Case, Secures Global Market Rights



Pakistan Strengthens Global Basmati Position with Legal and Trade Wins

New Zealand High Court dismisses India's appeal, reaffirming Pakistan's status as a legitimate Basmati producer and boosting export prospects in Europe under GSP+.

- In a decisive moment for Pakistan's rice sector, the **New Zealand High Court** on **16 November 2025** rejected **India's appeal** seeking exclusive certification rights for **Basmati rice**, reaffirming Pakistan's position as a legitimate producer of the aromatic grain. The court upheld that the "**Basmati Growing Area**" spans regions in both **Pakistan and India** and noted that **New Zealand** consumers view basmati as a type of long-grain rice, not exclusively Indian.
- The legal battle dates back to **February 2019**, when India's Agricultural and Processed Food Products Export Development Authority (APEDA) applied to register "**Basmati**" as a certification mark solely for Indian-grown rice in New Zealand. After New Zealand's Intellectual Property Office rejected the application **in July 2024**, India appealed. The High Court's recent ruling dismissed that appeal, describing India's claim as unfairly restrictive to Pakistani exporters and unsupported by consumer perception.
- Former chairman of the **Rice Exporters Association of Pakistan (REAP)**, Rafique Suleman, called the decision a "**purely merit-based verdict**" and said it strengthens Pakistan's position in other ongoing international cases where India has attempted similar claims. The judgment follows a December 2022 decision by Australia's trade authorities that also **rejected India's exclusive Basmati claim**.
- Pakistan is leveraging this momentum beyond courts. On 23 November 2025, during talks with the Netherlands, Pakistani trade officials highlighted the **basmati issue** and requested **EU support for fair recognition** under the **GSP+ trade scheme**. Officials emphasized that India's claim lacks historical and legal basis and pointed to untapped potential for Pakistani rice exports in Europe. The discussions also explored cooperation in agriculture, dairy, and technology-driven services.
- For Pakistan, the combination of judicial victories and diplomatic engagement is more than a win on paper. It safeguards global markets for Basmati rice, reinforces its heritage as a premium rice producer, and positions the country to expand exports, particularly in high-value markets. As of late November 2025, Pakistan stands stronger than ever on the global basmati map, with its reputation and trade prospects firmly protected.

Source: News, Publications & Reports

MAJOR GLOBAL NEWS HIGHLIGHTS OF (November 2025):



- India's rice procurement has surged this kharif season, with the **Food Corporation of India (FCI)** purchasing **over 70 lakh tonnes** in the second half of October, raising total October procurement to 119 lakh tonnes, up from **81.85 lakh tonnes** last year. Early harvesting in Punjab, **Haryana, and Tamil Nadu** boosted procurement, with Punjab alone contributing **69.39 lakh tonnes**, nearly **49% higher than last year**. The **government aims to procure 463.49 lakh tonnes for 2025-26**, though actual 2024-25 procurement was **545.22 lakh tonnes**.
- The recent Bharat International Rice Conference (**BIRC**) 2025 provided Indian farmers, exporters, and millers a platform to showcase over 1,000 rice varieties and **explore export opportunities**. GI-tagged and specialty rice gained global attention, with several contracts signed for export to Japan and other countries, highlighting India's ambition to expand its share of the **world rice market**.
- However, storage remains a pressing challenge. Punjab millers report insufficient **FCI** capacity, able to hold only **22 lakh tonnes** against **105 LMT** of expected rice, urging government action to transfer stocks to other states or expedite exports to prevent quality losses.

Source: News & Publications



- Despite **global rice and wheat prices declining** over the past year, **consumers in Bangladesh continue to face rising costs**. Between October 2024 and October 2025, retail prices for coarse, medium, and fine rice increased by **Tk0.85–4.43 per kg**, even as international rice from Thailand, India, and Vietnam fell sharply. Experts note that local markets respond quickly to price hikes but slowly to reductions, leaving households paying more despite global trends.
- Food stocks have dropped from over **2.1 million tonnes** in August 2025 to about **1.3 million tonnes by mid-November**. In response, the government plans to **import 300,000 tonnes of rice** to maintain stability, while Aman harvesting is underway and fresh rice is expected to reach markets soon.
- To protect farmers and ensure food security, the government will procure **700,000 tonnes of rice and paddy locally from November 20, 2025, to February 2026**. Priority is given to direct purchases from farmers, stabilizing prices and securing fair profits..

Source: News & Publications

MAJOR GLOBAL NEWS HIGHLIGHTS OF (November 2025):



- **Thailand's rice exports** fell **24% to 7.5 million tonnes in 2024-25**, hit by rising competition from India and Vietnam. White rice shipments declined sharply, while parboiled and fragrant rice held strong in premium markets. **Thai production for 2025-26** is projected at **20.48 million tonnes**, its fourth-largest harvest, with **ending stocks of 3-4 million tonnes** helping stabilize domestic prices.
- Domestically, **jasmine rice prices** surged to **16,100 baht per tonne**. The government, led by Prime Minister Anutin Charnvirakul, introduced measures like rice-stock pledging, delayed-selling schemes, and provincial trade fairs to **absorb excess supply**. Early results show higher prices, strong buyer participation, and improved market access, boosting farmers' incomes.
- On the export front, **China plans** to buy **500,000 tonnes of Thai rice**, with Singapore adding **100,000 tonnes**. Analysts say these deals help counter US tariff pressures, while strong domestic demand and government support sustain Thailand's export target of **7.5-8 million tonnes**.

Source: News & Publications



- **Vietnam's rice exporters** face uncertainty as the **Philippines extends its ban** on regular rice imports through **the end of 2025**, affecting the country's largest rice market, which accounts for over **40% of shipments**. Despite this, firms have turned to African and Middle Eastern markets, mitigating the impact. In the **first ten months of 2025**, Vietnam exported **7.2 million tonnes** worth **USD 3.7 billion**, with premium varieties like **ST25** maintaining strong international demand.
- **ST25**, which recently won the **World's Best Rice Award 2025** for the third time, highlights the need for strong branding and consistent market strategies. Authorities are also advancing the "One Million Hectares of **High-Quality, Low-Emission Rice**" program in the Mekong Delta, improving **sustainability and competitiveness**.
- Looking ahead, Vietnam is focusing on **diversifying export markets**, strengthening logistics and storage, and supporting farmers, aiming to retain its **position as the world's second-largest rice exporter**.

Source: News & Publications

UPCOMING EVENTS:



Gulf Food Fair 2026

Date: January- 26, 2026 to January -30, 2026

Locations:

- Dubai world trade center
- Dubai expo city

For more details, please click here: [Global Rice Events](#)



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